

Don't Forget to Sign It!

Call Center Options for E-Signatures

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SOCIAL SERVICES

CDSS

Electronic Signatures

Telephonic Signatures



Thinking beyond recorded telephonic signatures: electronic signature options can be incorporated into phone based interactions.

Background

- CDSS ACIN I-60-13 (issued September 23, 2013)
 - Guidance on recorded telephonic signatures
- FNS Administrative Notice 16-28 (issued May 3, 2016)
 - Guidance on electronic signatures for SNAP
- FNS Final Rule (effective May 8, 2017)
 - Final regulations implementing 2008 Farm Bill electronic signature provisions
- CDSS ACL 17-57 (issued June 9, 2017)
 - Guidance on electronic signatures for CalFresh & CalWORKs

E-Signature Requirements



1. Client must take an affirmative action.
2. Record of the signature must be maintained electronically & linked to document to which the signature attests.
3. Must constitute a legal signature in California.

E-Signature Options

Note that an e-signature can be used at application, SAR 7 and recertification.

- Handwritten signature input onto electronic signature pad
- Handwritten signature, mark, or command input on a display screen
- Digitalized image of handwritten signature
- Typed name (e.g. online application)
- Unique identifier (e.g. code, password or PIN)
- Electronically recorded sound (e.g. telephonic signature)
- The process of using a mouse to click a button (e.g. “I Agree” button)
- Digital signature

Unique Identifier

An alternative to recorded telephonic signatures which may easily be incorporated into telephone based business processes.

Example Unique Identifiers:

- Last four digits of Social Security Number
- Last four digits of case number
- Previously provided PIN
- PIN provided over the phone by the CWD
- Birthdate of applicant

E-Signature CalWORKs

With release of ACL 17-57 now allowable!

Must meet existing CalWORKs requirements:

- Face to face interview, unless county has elected to implement telephone interviews via county plan.
- Multi-signature program – all aided adults must provide electronic signature.

CWD Responsibilities

- Remain consistent with responsibilities outlined in ACIN I-60-13
 - Now apply to **all** electronic signatures at application, SAR 7 and recertification.
 - As of March 9, 2018 state agencies no longer need to request a waiver to provide copy of application electronically. California's electronic copy waiver will become obsolete.

Questions?

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